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TO: Economic Support Supervisors
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Training Staff
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W-2 Agencies
Workforce Development Boards
Job Center Leads and Managers

FROM: Amy Mendel-Clemens
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Bureau of Health Care Eligibility
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BHCE/BWP OPERATIONS MEMO

No: 04-61

DATE: 12/03/2004

FS	<input checked="" type="checkbox"/>	MA	<input checked="" type="checkbox"/>	SC	<input type="checkbox"/>
CTS	<input type="checkbox"/>	CC	<input checked="" type="checkbox"/>	W-2	<input checked="" type="checkbox"/>
FSET	<input type="checkbox"/>	EA	<input type="checkbox"/>	CF	<input type="checkbox"/>
JAL	<input type="checkbox"/>	JC	<input type="checkbox"/>	RAP	<input type="checkbox"/>
WIA	<input type="checkbox"/>	WtW	<input type="checkbox"/>		
Other	EP	<input type="checkbox"/>	★		

PRIORITY: HIGH

SUBJECT: Electronic Case File Enhancements

CROSS REFERENCE: Operations Memo 04-25

EFFECTIVE DATE: December 13, 2004

PURPOSE

This memo outlines the implementation of Phase II of the Electronic Case File (ECF) project.

NOTE ➤ In order to facilitate the conversion outlined below, the ECF application will not be available on Friday, December 10, but is scheduled to be up and fully functioning on Monday, December 13, 2004. If the application will not be available on Monday, a DXBM will be sent.

BACKGROUND

Phase I of the ECF project provided online access to the Employment Verification and Insurance Verification forms (EVF-E and H). In Phase II, case file documents will be electronically scanned and organized into logical subfolders.

With the conversion to electronic documents, workers will be able to access and scan an entire case folder, or locate a specific document within a folder and view it on their screen. The conversion will also:

- Permit workers, supervisors, and other authorized individuals to simultaneously access documents,
- Reduce the need for paper storage, and
- Provide electronic storage for management of case files.

Phase II is designed to allow the complete conversion of the paper case file to an electronic version. Different models of the ECF are being developed to accommodate the unique business needs of agencies of various sizes.

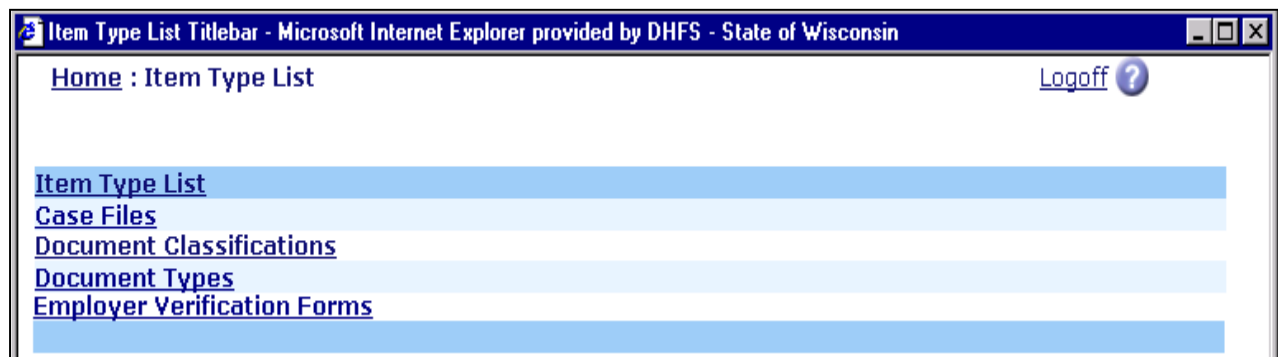
A pilot of this project began in early October 2004 in Dane, La Crosse and Price counties. A statewide rollout will occur following the results of the pilot counties.

ELECTRONIC CASE FILE STRUCTURE

The ECF is currently being used to view EVF-E and EVF-H documents. As we move towards the inclusion of all case documents in the ECF, some changes are being made to the system's internal folder structure to accommodate the additional documents to be stored in the ECF.

CURRENT FOLDER STRUCTURE

In the current system, clicking on 'Search' takes you to the 'Item Type List' screen. On the 'Item Type List' screen, clicking on the 'Employer Verification Forms' item type takes you to the 'Basic Search' screen to view EVF-E and EVF-H forms.

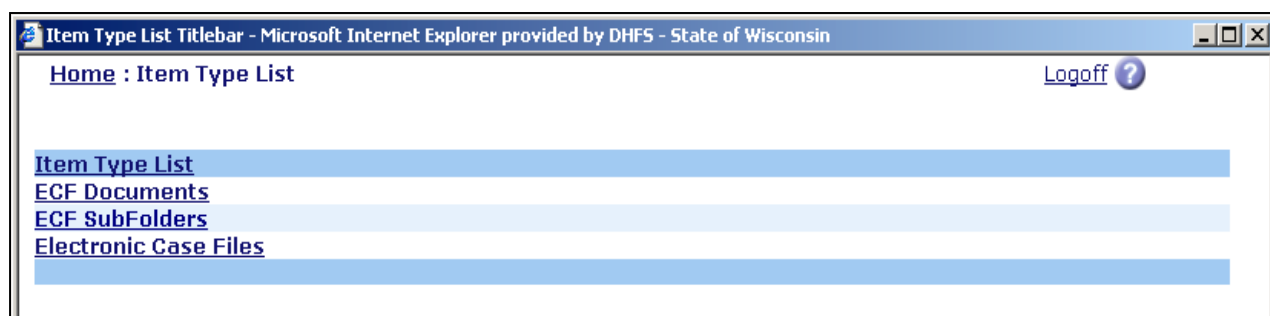


NEW FOLDER STRUCTURE

Within the new folder structure, clicking on "Search" will still take you to the 'Item Type List' screen, however the options on this screen are different. The ECF will consist of a main case folder with the following sub folders stored under **ECF Sub Folder** Item Type

1. Case Information
2. Non Financial Information – **Here is where you will find the EVF-H.**
3. Asset Information
4. Income – **Here is where you will find the EVF-E.**
5. Expenses
6. W-2/FSET
7. Misc/County Specific
8. Restricted Documents

Effective with this change, some or all of the above mentioned subfolders may appear when you access the ECF for a case, but only if that case file contains documentation previously scanned into the ECF. The new folders will not appear if there are no documents stored within that folder.



In order to view EVF-E and EVF-H forms, you will now click on '**ECF Documents**' in order to access the 'Basic Search' screen.

The operation of the 'Basic Search' screen is the same as in the current system, however you may notice some new entry fields on this screen. You will still enter search criteria such as case number, SSN, or pin, and if you want only EVF forms returned, enter EVF* in the 'Document Type' field.

CONFIDENTIAL CASES

This new folder structure will also allow the primary worker and his/her supervisor to view EVF documents associated with a Confidential case.

TRAINING

Training on how to properly scan and index (into which folder to store the scanned document) documents will be available prior to your agency starting the scanning process. A DHFS representative will contact your agency Technical staff to schedule the training. There is no timeline outlined for a roll-out beyond what is currently in pilot.

Documents on case file clean up, what items to scan and an ECF user guide will be sent to your agency prior to training.

CONTACTS

BHCE CARES Information & Problem Resolution Center

★Program Categories – FS – Food Stamps, MA – Medicaid, SC – Senior Care, CTS – Caretaker Supplement, CC – Child Care, W-2 – Wisconsin Works, FSET – Food Stamp Employment and Training, CF – Children First, EA – Emergency Assistance, JAL – Job Access Loan, JC - Job Center Programs, RAP – Refugee Assistance Program, WtW – Welfare to Work, WIA – Workforce Investment Act, Other EP – Other Employment Programs.